



Client Name: Ivan Mladenovic

Country: United States

Total Users: 4

Subscription: Zoho One



ABOUT

M2E Consulting Engineers is a leading, multi-disciplinary engineering firm based in Miami, Florida, providing reliable and innovative engineering solutions of the highest quality to its partners across major markets and locations. With broad experience in residential, commercial, hospitality, and institutional markets, the firm offers diverse talent and expertise through a wide range of specialized engineering services, including Developer Services, Condominium Services, Construction Litigation Services, Architectural & Contractor Services, Design Services, Green Services, and Structural & MEP Inspections.



PROJECT OVERVIEW

M2E Consulting Engineers engaged UniCloud IT Services to implement a unified business management system using Zoho's CRM, email marketing, help desk, and project management solutions. The goal was to streamline operations, consolidate software tools, and build a scalable system that could support long-term growth and future ERP integration.

PROJECT OBJECTIVES

UniCloud IT Services was tasked with helping M2E Consulting Engineers transition smoothly from their existing platforms to Zoho. The project aimed to migrate all relevant contact and account data from Unanet into Zoho CRM with accuracy and minimal disruption. Another key objective was to implement a Kanban-style sales pipeline to enhance visibility and management of opportunities. The team also needed to configure Zoho email marketing tools for targeted customer engagement, migrate forms and surveys from SurveyMonkey, replace monday.com with Zoho Projects or Zoho Tables for efficient litigation tracking, and design a scalable solution capable of supporting future ERP integration.

CHALLENGES

M2E Consulting Engineers faced several operational challenges prior to implementation. Their data and workflows were fragmented across multiple platforms, causing inefficiencies, inconsistent reporting, and difficulty in tracking sales and project progress. Customer communication and support systems were disconnected, with many processes reliant on manual intervention, leading to delays and increased error risk. Additionally, the client required a solution that would not only streamline current operations but also scale effectively to support future ERP integration and long-term growth.



SOLUTIONS

UniCloud IT Services implemented a comprehensive Zoho ecosystem for M2E Consulting Engineers. All contact and account data were migrated from Unanet to Zoho CRM with verified accuracy. A Kanban-style sales pipeline was designed to improve opportunity management and visibility. Zoho Campaigns was configured for targeted email marketing, with segmented lists and branded templates ensuring consistent communication. SurveyMonkey forms were migrated to Zoho Forms while preserving data integrity and workflows. Zendesk data, including tickets, users, and attachments, was migrated to Zoho Desk with workflows and automation configured to mirror existing operations. monday.com workflows were replicated in Zoho Projects/Tables for seamless litigation tracking. The implementation included user training, detailed workflow documentation, and end-to-end testing to ensure smooth adoption.

FUNCTIONALITY & FEATURES

Centralized CRM: Migrated all contact and account data from Unanet to Zoho CRM with verified accuracy.

Kanban-Style Sales Pipeline: Structured pipeline covering stages from initial contact to deal closure for enhanced opportunity management.

Email Marketing Automation: Configured Zoho Campaigns with segmented lists, branded templates, and automated outreach.

Form & Survey Migration: Transferred SurveyMonkey forms to Zoho Forms while preserving existing workflows and data integrity.

Help Desk Automation: Migrated Zendesk tickets, users, and attachments to Zoho Desk with workflows and automations configured.

- **Litigation Tracking:** Recreated monday.com workflows in Zoho Projects/Tables for structured project management.
- **Scalability & ERP Readiness:** System designed to accommodate future ERP integration and long-term growth.
- **Training & Documentation:** Provided user training sessions and detailed workflow documentation for smooth adoption.
- **End-to-End Testing & Go-Live:** Conducted comprehensive testing to ensure all processes worked seamlessly before launch.

CONCLUSION

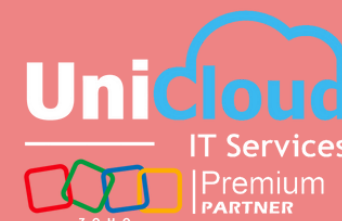
Through collaboration with UniCloud IT Services, M2E Consulting Engineers successfully transitioned to a unified, efficient, and scalable Zoho ecosystem. The implementation consolidated workflows, improved operational visibility, and reduced costs, enabling the client to focus on growth, strategic initiatives, and high-quality customer engagement.

ABOUT US

Founded on September 12, 2018, UniCloud IT Services is a trusted cloud service provider specializing in ZOHO solutions. Our team of experienced developers brings over seven years of combined expertise, delivering tailored services that help businesses across industries achieve their goals.

To date, we have successfully completed 1,000+ projects for over 5,000 clients, maintaining a 95% project success rate and strong client retention. Our team holds multiple ZOHO certifications, reflecting our commitment to quality, security, and reliable support.

UniCloud continues to expand its services, partnering with organizations of all sizes to implement effective, technology-driven solutions.



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